



## **EMPLOYEE/USER MANAGEMENT**

**Before proceeding, make sure you selected the correct organization at the Main Menu for which you want to enter Employee/Users.**

**At the top of the screen, it should show “Employee List for (*organization*)”. Initially, the only user listed will be the Master User.**

Select “Add Employee” to add employees to organization. Employees you referenced as management under “Contact Information” section should be added here. Employees you add here do not have to have access to OLGA. **Make sure to SAVE information; CLOSE will exit you out of the page and not save anything.**

Add Employee:

**Organization:** If you have access to all subsidiaries, you can select a subsidiary to add an employee to.

**Assign OLGA UserID?:** If you select ‘no’, then you only need to enter name, title, phone, fax, and email information. If you select ‘yes’, the following information will be necessary:

**User Id:** Assign a user id of your choice. Click on help button for assistance on naming conventions.

**Password:** Enter an initial password that you will communicate to the new user. Enter it twice for confirmation. This password will be requested to be changed when the new user initially logs in.

**First Name:** Enter first name.

**Middle Initial:** Enter middle initial, if there is one.

**Last Name:** Enter last name.

**Job Title:** Enter job title of the employee.

**Work Phone:** Enter the 10 digit phone number for the employee.

**Cell Phone:** Enter the 10 digit phone number for the employee.

**Fax:** Enter the 10 digit fax number to use when faxing items to this employee.

**Email:** Enter the email address for the employee.

### **Roles – Limit user access to subsidiary only?**

Check ‘yes’ if you want the employee to only be able to see information for a particular subsidiary you’ve selected above under Organization. Check ‘no’ if the employee can see information for the organization and all subsidiaries.

### **User Access, Contact Information, Inventory, Capital Budget/Six Year Plan, Grant Applications, Grant Administration (aka Grant Management), Performance Data.**

These selections correspond with your selections under the Main Menu. You can specifically identify the type of access you wish the employee to have to OLGA. ‘Update’ will allow the employee to perform any function available on the screen.



'Read Only' will allow the employee to see any items on the screen, but not allow the employee to enter or change anything.

'No Access' will not allow the employee to access the screen.

**Submit Grant Applications:** If checked, will allow employee to submit grant applications. Make sure you give the employee update or read only access to the 'Grant Applications' section if you intend on allowing access to this function.

**Sign Certifications & Assurances:** If checked, will allow employee to certify and submit the certifications and assurances on behalf of the organization in the Grant Application section. Make sure you give the employee update or read only access to the 'Grant Applications' section if you intend on allowing access to this function.

**Approve and Submit Reimbursement Requests:** If checked, will allow employee to approve and submit reimbursement requests in the Grant Management section. Make sure you give the employee update or read only access to the 'Grant Administration' section if you intend on allowing access to this function.

**Approve and Submit Extension Requests:** If checked, will allow employee to approve and submit reimbursement requests in the Grant Management section. Make sure you give the employee update or read only access to the 'Grant Administration' section if you intend on allowing access to this function.

**Certify Grantee Information:** If checked, will allow employee to certify the Grantee Contact information in the Grantee Information section. Certification means the contact information has been checked for accuracy and is current. Make sure you give the employee update or read only access to the "Contact Information" section if you intend on allowing access to this function.

**Approve Contracts:** If checked, will allow employee to approve contracts for grants in the Grant Management section. Make sure you give the employee update or read only access to the 'Grant Administration' section if you intend on allowing access to this function. This access should typically be given to upper management.

**View Tax Information:** If checked, will allow employee to view tax identification number. Make sure you give the employee update or read only access to the 'Contact Information' section if you intend on allowing access to this function.

Delete:

The delete option next to the individual employee listed will allow you to delete the employee from the list. "Cancel" or "Confirm" will pop up when you click on delete to allow you the option. The deleted employee's information is retained in the database files for tracking purposes, but will not appear on the organization's list. You will need to contact the DRPT system administrator to reinstate any deleted employees.

Modify:

The modify option next to the individual employee listed will allow you to modify the employee information you entered under "Add Employee". In addition, the following options are added:



**“Remove OLGA User Access”** when selected will remove the OLGA access for that employee.

**“Reset Password”** when ‘yes’ is selected (defaults to ‘no’) allows you to enter a temporary password for the employee, when he/she has forgotten his/her password.